



# Management Plans

- \* Approximately \_\_\_\_\_% of woodland owners in the USA have written plans...
- \* For those in Oregon with a written plan:
  - \* 41% received greater income due to the plan
  - \* 84% felt it "increased awareness of management options"
  - \* 86% said the plan helped them "make more informed management decisions"

# Key Question: How Do Plans Help Forest Owners?

- \* Encouraging them to be active managers of their land.
- \* Create a record for current and future generations owning the land.
- \* Meet requirements for tax deferral, and/or building a home.
- \* Qualifying for incentive programs.
- \* Meeting requirements of certification.

# Management Planning Lessons

- \* Completed plans are much more important to professionals and programs than they are to landowners.
- \* Management planning is a journey not a destination.
- \* There is no one right path for all owners.
- \* Goal is not just completed plans, but better land stewardship.

## Forest Mgt Plans in Oregon, circa 2003

Plan Type	Making better decisions	Meeting regulations	Certification	Cost-Share	
Stewardship (USFS)	Yes	Yes	Maybe	Yes	
Conservation (NRCS)	Yes	Yes	No	Yes	
Tree Farm (ATFS)	Yes	Yes	Yes	Maybe	
Certification (FSC)	Yes	Yes	Yes	Maybe	
Fish & Wildlife (ODF&W)	Yes	Yes	No	Maybe	

## Plan Elements Change:

Plan Type		Stewardship	Tree Farm	NRCS
Cover Page	X	X <sup>'</sup>	X	
Plan Introduction		X	X	
Landowner Goals & Objectives		X	X	X
Property Map/Woodland Description	X	X	X	
Forest Vegetation		X	X	X
Wildlife/Fish Habitat		X	X	X
Soils		X	X	X
Roads & Access		X	X	X
Water Resources		X	X	X
Forest Health		X	X	X
Integrated Pest Management			X	
Invasive Species		X	X	X
Protection from Wildfire	X			
Agro-forestry/Range				X
Archeological & Cultural Resources	X	X	X	
Recreation		X	X	X
Aesthetic/Scenic		X	X	X
Threatened and Endangered Species	X	X	X	
Special Sites		X		
Forest Practice Rules		X	X	
High Conservation Value Forests			X	
Assistance		X		X
Management Recommendations & Priorities		X	X	X
Harvest Monitoring			X	

X= NEW ELEMENT FOR 2010

# Why a "Joint Template?"

- Simplify process for landowners.
- \* Save time and money for landowners in meeting program requirements for cost-share and certification.
- \* Consolidation planning process and terminology nationally, better for forestry professionals.

# Managing Your Woodlands Joint Template meets the requirements for:

- Plans written under the USDA-National Forest Stewardship Program
- Certification through the American Tree Farm System
- 3. Forestry Financial Assistance administered by the Natural Resources Conservation Service (NRCS).







# For Program Information

- Forest Stewardshiphttp://www.fs.fed.us/spf/coop/programs/loa/fsp.shtml
- 2. American Tree Farm Systemwww.treefarmsystem.org/stateleaders
- 3. NRCS- <a href="http://www.nrcs.usda.gov/programs/">http://www.nrcs.usda.gov/programs/</a>

## Template and Guide Materials

- \* Managing Your Woodlands: A template for your plans for the future (Fillable Word Document)
- \* Template Guide for Landowners (PDF)
- \* Template Guide for NR Professionals (PDF)

#### http://www.treefarmsystem.org/tree-farm-management-plan-templates

#### Management Plan Template

8hare

Thank you for your interest in the Managing Your Woods: A Tomplate for Your Plans for the Future that was developed by ATFS, the Natural Resources Conservation Service (NRCS) and the U.S. Forest Service, with input from state forestess and other partners.

Home = Management Plan Template

The goal of this joint management plan template is to allow landowness to use one management plan to participate in the American Tree Farm System, the Forest Stewardship Program, and the NRCS incentive programs.

This national template has been developed in accordance with all the national program requirements for the three

programs listed above. The template is not a program requirement for any of the three programs; rather it is a tool for landowners and foresters.

This national template is based on the Montana Forest Stewardship and Tree Farm management plan developed by Forestry Professor Dr. Peter Kolb of Montana State University <a href="https://www.mayestension.org/">https://www.mayestension.org//morestry/</a>: His intent was to provide an easy to use, practical, and ecologically based guide for forest landowners: 1) who wished to assers their forests for its unique qualities and value, 2) that wanted to develop an action plan that conserves the functionality and productivity of their forest, 3) that desire an efficient and independent forest plan that combines the criteria of state, national and international certification and cost-share programs. The final template further incorporated components from similar forest landowner programs developed in Missouri, Mississippi and Oregon. After developing the first diraft of this template, the template was sent to ATES, state forester and NRCS networks for feedback and comments.

This template and its associated landowner and torester guides is the result of their feedback state. Tree Farm programs, state foresters and NRCS can join together to review the template to see if it would be a useful tool for landowners in their state. If so, then the template can be adapted for your state's use. As long as all the components of the national template are present and addressed in the state modified template, then there is no need for national level approval.

States are also encouraged to add their own state-specific requirements, programs and resources available for landowners and foresters.

To implement the template and allow easy access for landowners, the state Tree Farm program, state forester and state conservationist will have to develop a process for landowners to apply for the programs. Some ideas that other states have developed include:

- A panel that reviews/approves plans for all three programs in that state. The panel is made up of representatives from each program.
- One person identified by the state who can approve plans for all three programs. The program signature
  page will need to be updated to include a description of the process for landowners and the appropriate
  signatures necessary for a landowner to participate.

GUIDE FOR FORESTERS FOR THE JOINT MANAGEMENT PLANTEMPLATE

GUIDE FOR LANDOWNERS FOR THE JOINT MANAGEMENT PLANT TEMPLATE

MANAGING YOUR WOODLANDS NATIONAL ATFS, FS, NRCS JOINT MANAGEMENT PLAN TEMPLATE

Create Your MyLandPlan.org Recount to Map Your Forest and Set Goals for Your Land.

Guide for Foresters for the Joint Management Plan Template

Guide for Landovmers for the Joint Management Plan Template

Managing Your Woodlands National ATES, ES, NRCS Joint Management Plan Template

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# **Template Topics**

- Owner/Author Information
- Property Description
- \* Property History
- Forest Management Goals
- \* Property Map(s)
- \* Forest Natural Resources Enhancement and Protection
  - Protect Special Sites & Social Considerations
  - \* Air, Water, and Soil Protection
  - \* Fish, Wildlife and Biodiversity
  - \* Management of Forest Resources
  - \* Other
- Stand Level Information
  - Stand 1 Objectives
  - Stand 1 Current Conditions
  - \* Stand 1 Desired Future Stand Condition
  - Stand 1 Forest Management Activities
- Management Activity Schedule and Tracking
- Signatures and Approvals

## Guidance for Each Template Section

#### Access

- \* Are property boundaries posted?
- \* How are they marked?
- \* Does the landowner have legal access to the property?
- \* Is public access allowed?
- \* Address access for management purposes.

# Template Considerations

- \* It's a template, not a cookbook.
- \* All items will not apply to all properties (i.e. some properties do not have active water sources).
- \* Use the template as an approach to engaging landowners in the active management of their forests.

# A Guide for Natural Resource Professionals on Using: Managing Your Woodlands: A template for your plans for the future

- \* Instructions for foresters and others who are helping landowner prepare plans.
- \* Links for accessing resources helpful in completing the plan.





#### **Understanding Your Plan**

A Guide for Landowners Using: Managing Your Woodlands:

A Template for Your Plans for the Future

### Parts of Template for Landowner Input:

- Property description and history
- \* Goals
- \* Maps
- Resource management





### **Understanding Your Plan**

A Guide for Landowners Using: Managing Your Woodlands: A Template for Your Plans for the Future

### Other guide sections for landowners:

- \* Assistance List
- \* Extensive Glossary of Terms- i.e. Aspect
- \* Tax and Business Management Considerations
- \* Timber Sale Contract Checklist





## The Dilemma-Whose Plan Is It?

- \* Most plans written <u>for</u> landowners.
- \* "Most people have little interest in achieving goals set by someone else."



## Landowner Goals & Objectives:

- \* Goals (Broad statements of desired outcomes for property)
- \* Objectives (Planned actions [specific and measurable] to achieve goals)

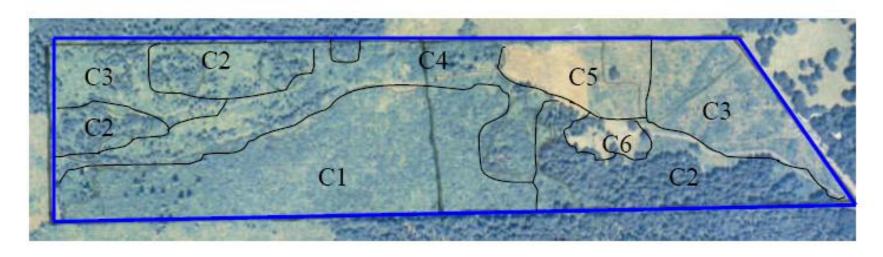
# The first step: Collecting Information (to be done with landowner)

- \* Owner information
- Property information, including various parcels owned
- \* Property history
- \* Past practices
- \* Special sites



## Maps & Photos

Corvallis Tract: 1997 Aerial Photo



#### Corvallis Tract Map Key:

- C1- Older Conifer Plantation, circa 1987
- C2- Older sawtimber, 65 years
- C3- Younger plantation- since 1993
- C4- Riparian forest
- C5- Christmas trees
- C6- Home and Arboretum





My Plan | About Us | Log out | Join Us | Keyword Search

What do you want to do with your land?

Enjoy it Protect it Make it healthy Profit from it Pass it on Join Us My Plan

My Land My Goals and Actions My Forest Journal Ask a Forester

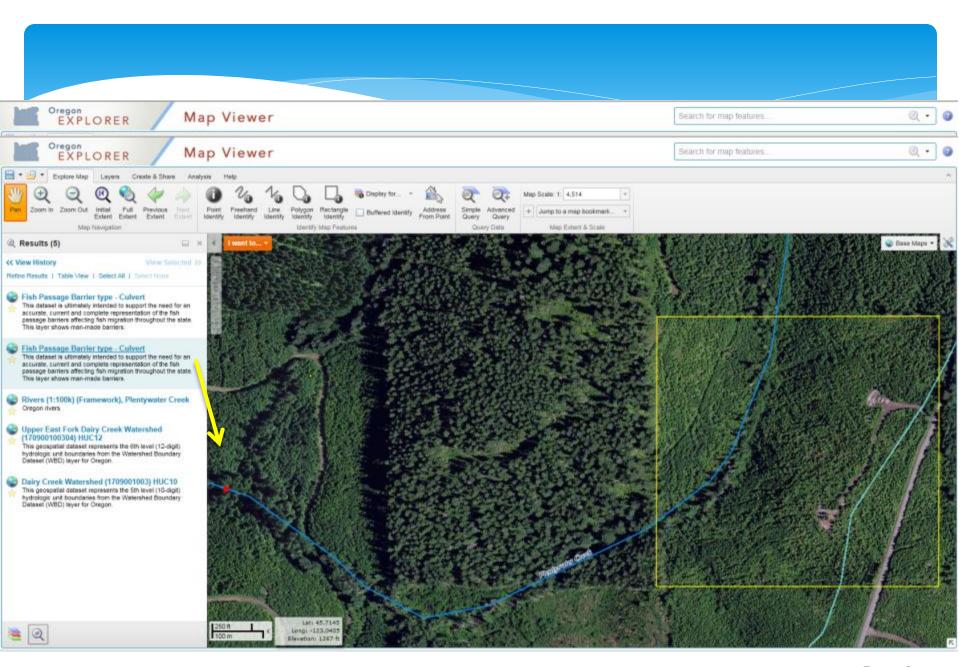
#### Alder Creek Woods

View Edit Basic Info Edit Map Goals and Actions Property Features Delete Property

#### Edit Property's Features



Rick Fletcher, Eaglesview Forestry



Rick Fletcher, Eaglesview Forestry

www.oregonexplorer.info

## Soils

- \* Use information from published soil surveys and other sources, if available, to identify major soil types, topographic and geological features and characteristics such as site index, slope stability, and soils limitations.
- \* A good source for soil data is on the web at: <a href="http://websoilsurvey.nrcs.usda.gov/app/">http://websoilsurvey.nrcs.usda.gov/app/</a>

#### Click on the "Start WSS" button to get started.

### websoilsurvey.nrcs.usda.gov



You are here: WSS Home

The simple yet powerful way to access and use soil data.



#### Welcome to Web Soil Survey (WSS)



Web Soil Survey (WSS) provides soil data and information produced by the National Cooperative Soil Survey. It is operated by the USDA Natural Resources Conservation Service (NRCS) and provides access to the largest natural resource information. system in the world, NRCS has soil maps and data available online for more than 95 percent of the nation's counties and

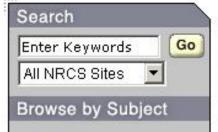
anticipates having 100 percent in the near future. The site is Rick Fletcher, Eaglesview Forestry updated and maintained online as the single authoritative source of soil survey information

#### I Want To...

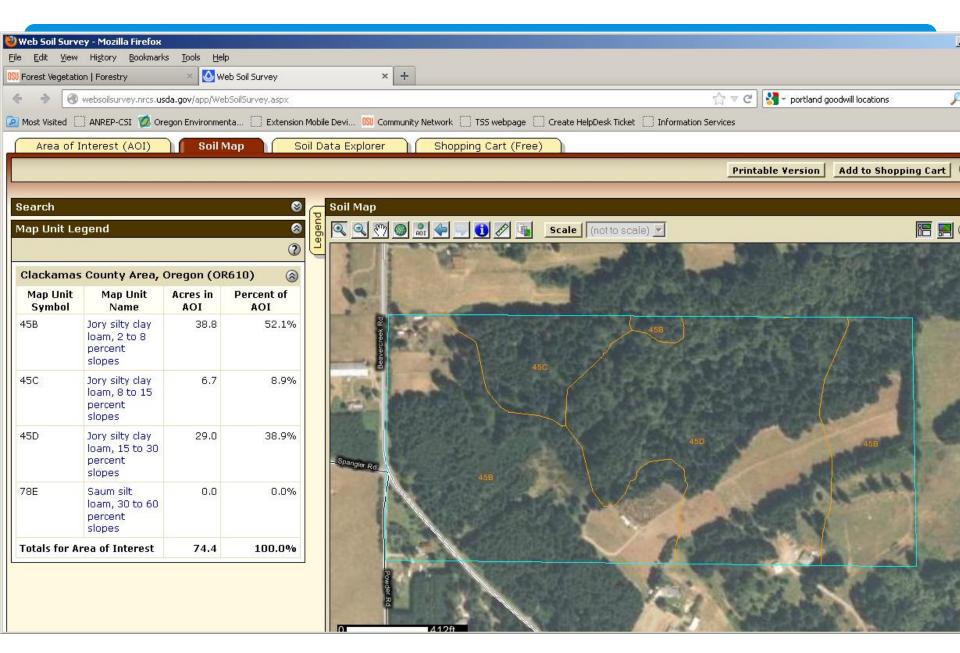
- Start Web Soil Survey (WSS)
- Know the requirements for running Web Soil Survey
- Know whether my web browser works with Web Soil Survey
- Know the Web Soil Survey hours of operation
- Find what areas of the U.S. have soil data

#### Announcements/Events

 Web Soil Survey 2.0 has been released! View description of new



- Soils Home
- National Cooperative Soil Survey (NCSS)
- Archived Soil Surveys
- Status Maps
- Official Soil Series Descriptions (OSD)
- Soil Series Extent Mapping Tool



# Web Mapping Tools

Mapping tool	Aerial photos?	Topo Map?	Soil Map?	Water bodies?	Markup and Print?
Google Earth	X				X
Web Soil Survey	X	X	X	X	X
MyLandPlan	X				X*
LocatOR	X	X			X
Oregon Explorer	X	X		X	X

<sup>\*</sup>print function pending

### Natural Resource Management & Protection



For each resource identify:



- 1.Landowner goal
- 2.Steps to be taken to protect and/or enhance the resource

# Identifying and Protecting Special Sites

- \* Forest owner <u>must</u> make a reasonable effort to locate and protect **special sites** appropriate for the size of the forest and the **scale** and intensity of forest management activities. (ATFS, 2010)
- \* Examples: American Indian burial sites, historical building ruins, old cemeteries, cave entrances, spring heads, rare mineral outcroppings)

# A Key Difference

- \* "Must" versus "Should" or "May"
- \* Where present, and relevant to the property, the plan must address High Conservation Value Forests.
- \* Where present, relevant to the property, and consistent with **landowner's** objectives, the plan preparer <u>may</u> consider aesthetic quality.



## **Roads & Access**

- \* Roads are under major regulatory scrutiny.
- \* Assess general road conditions under property description.
- \* Can use internet mapping tools like Google Earth to map roads.





# Tree Farm Standard for Rare Species & HCFV's

- \* Forest management activities <u>should</u> maintain or enhance rare species and **high conservation value forests**.
- \* High conservation value forests are evaluated at the landscape level rather than the forest stand level.
- \* For the Willamette Valley this could be oak savanna's.

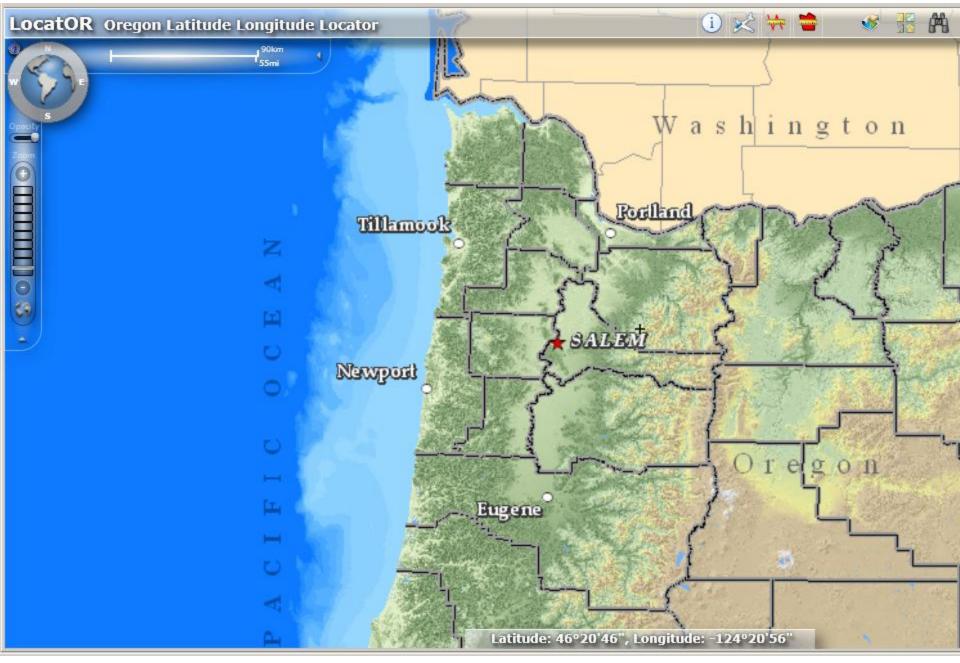
#### Assessing Presence of T&E Species

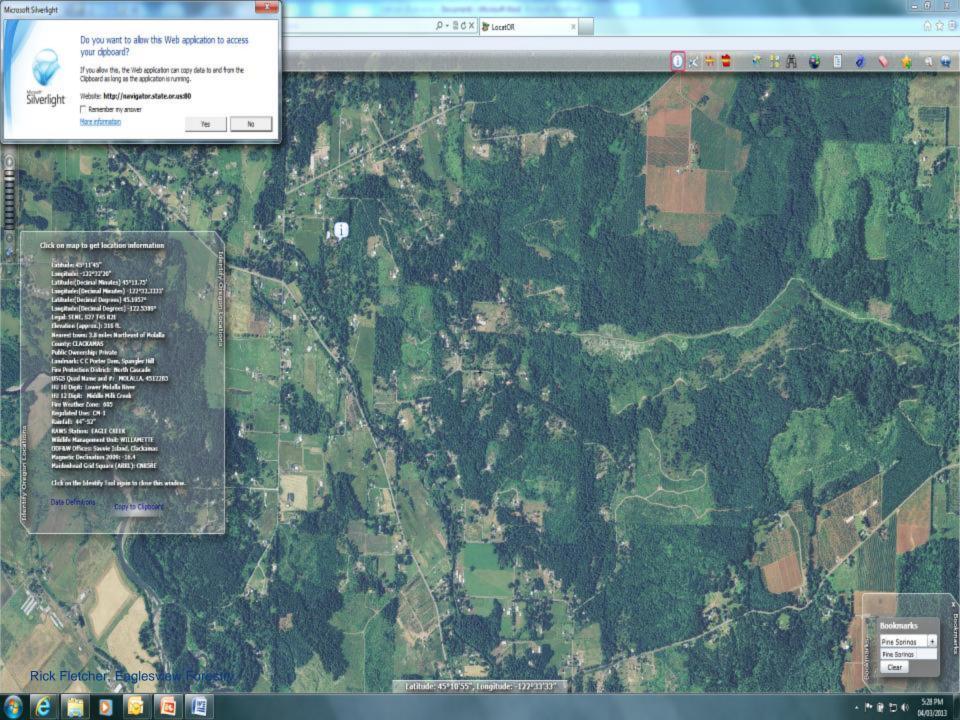


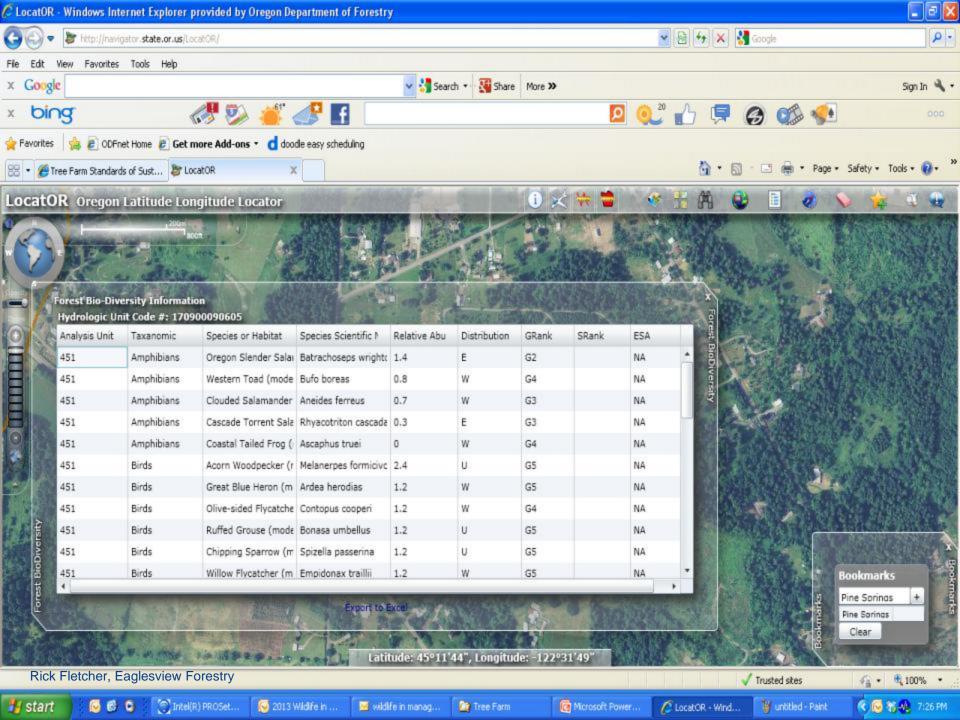
- Evaluate on the ground with a professional
- 2. Consult an online data base (such as NatureServe)

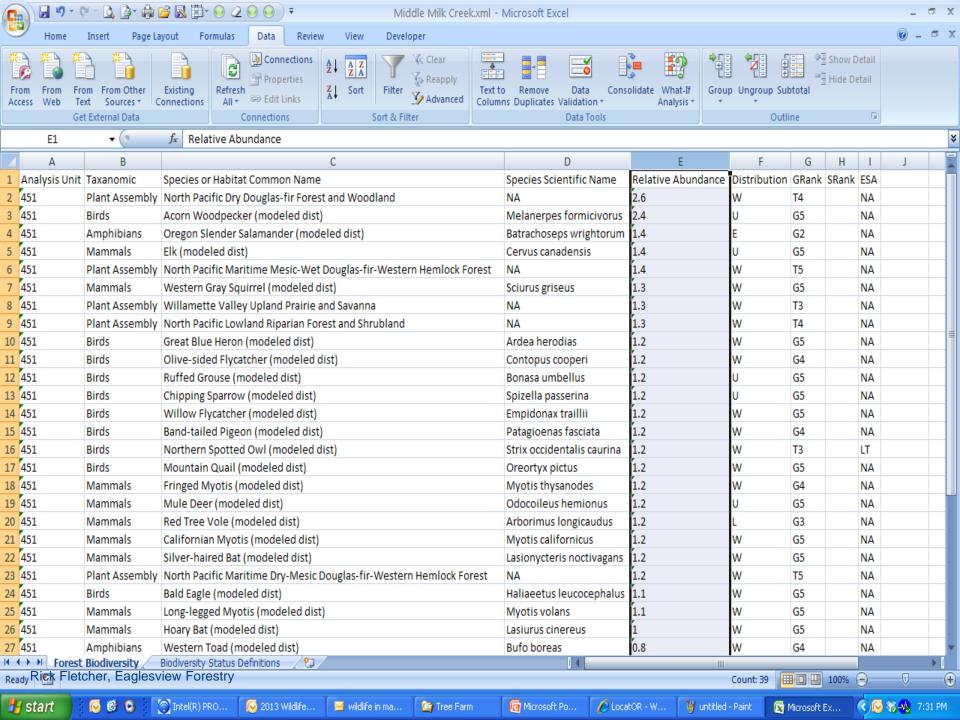


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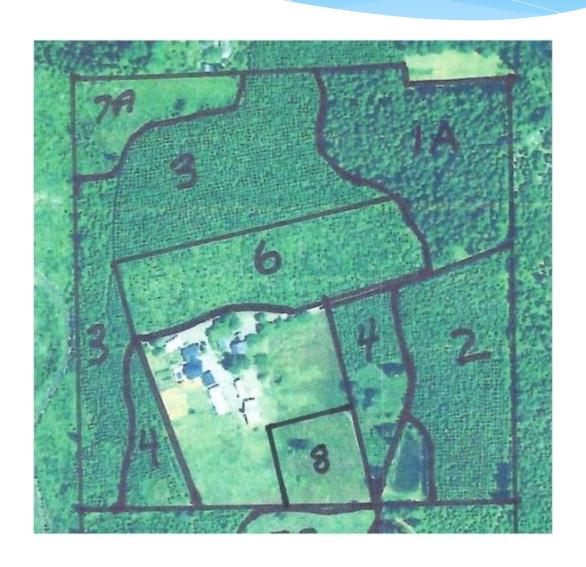








## Delineating Areas



## Scope of the Forest Vegetation Section

- >Timber cruise?
  - NO (unless landowner wants/has it)
- Detailed Inventory?
  - NO (unless landowner wants/has it)
- ➤ So what IS the scope??
  - Remember Size, Intensity, Scale, Interests
- Cuidelines are "baseline" ... add more detail (quantitative and qualitative) as desired and as appropriate.

#### Number of Layers (1, 2, 3, multiple)

#### Vertical Structure (# of Layers)

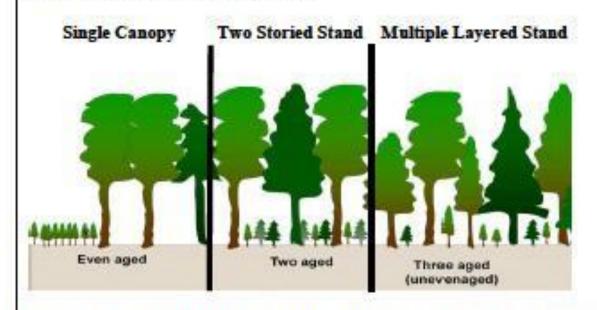
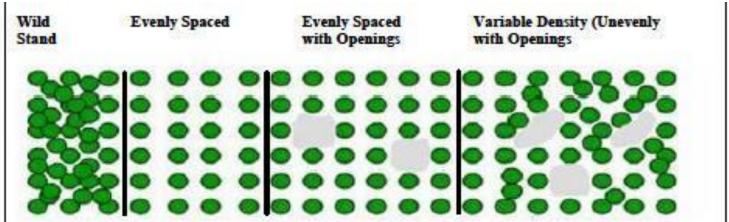


Illustration 1: Different ways to describe forest structure. Adapted from "Managing Your Woodlands – A Template for Your Plans for the Future" February 2011 (American Tree Farm System; U.S. Department of Agriculture Natural Resource Conservation Service; U.S. Department of Agriculture, Forest Service, Forest Stewardship Program".

#### For each canopy layer

- \* Growth stage
  - \* Seedling (up to 4.5 ft)
  - \* Sapling (1-5")
  - \* Small tree (6-11")
  - \* Large tree (12-29")
  - \* Very large tree (30"+)
- \* Spacing (Horizontal Structure)



## Management Activity Schedule and Tracking

- \* Important to develop this with the landowner.
- \* Make sure they understand the jargon and are committed to the activities.

### Signatures and Approval

- \* Plan must be reviewed and approved by all agencies who landowner wishes to qualify with.
- \* Some additional program requirements may be necessary- i.e. NRCS requires "job sheets" for individual practices that are approved.
- \* Additional state by state requirements may apply.

### **Updating Plans**

- \* Can be done at any time, but should be done for any significant property changes or events.
- \* Encourage landowners to do annual review.
- Electronic template facilitates updates.
- \* Can use handwritten notes with initials.

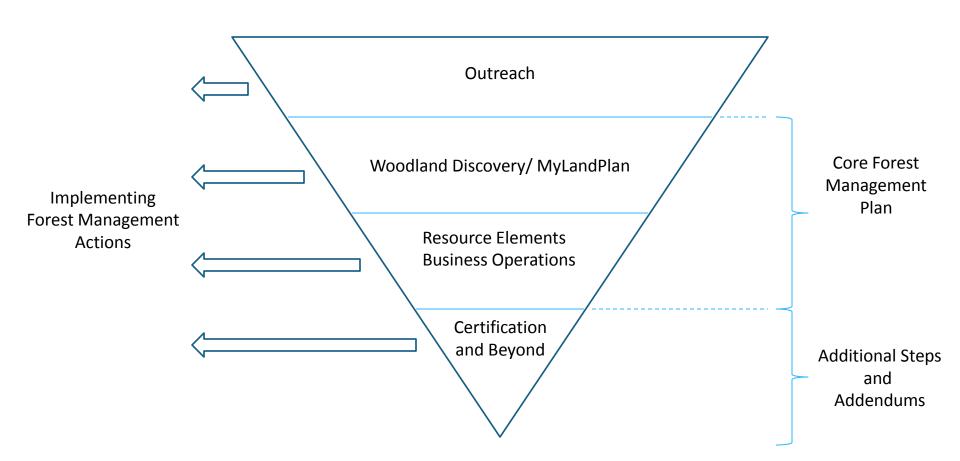
### Oregon's Joint Planning Effort

- \* Began in 2000
- Now includes all major organizations involved in woodland management plans.
- \* Endorsement process will be completed in June 2013.
- Process has created a new landowner website:
  - Know Your Forest

#### **Oregon's Joint Template Covers:**

- Plans written under
  - a) the USDA-National Forest Stewardship Program (ODF in Oregon)
  - b) Certification through the American Tree Farm System (OTFS in Oregon) and Forest Stewardship Council (FSC).
  - c) Forestry Financial Assistance administered by the Natural Resources Conservation Service (NRCS)
  - d) Plans required by OR Department of Fish & Wildlife

#### PATHWAYS TO STEWARDSHIP Engaging Landowners with their Forestland



# Tools for Oregon Plan Writers

- \* Management Plan Template/guidelines
- Mentored PlanningCourse

#### Forest Management Plan for [Property Name]

$\frac{Landowner(s)\; name(s)\; and\; address:}{}$	Plan writer name and address:
Landowner(s) phone:	Plan writer phone:
County	Forestland Acres
II. Property Location Legal description:	T R Sec(s)
Property Address:	
Latitude and Longitude:	
Land use classification(s):	
Fire Protection District:	
R <b>tek</b> IFdetohneersEaglesview Fo	o <u>restry</u>

I. Introduction and Context

Current property tax classification(s):

